

MOBILE FINANCE MANAGER INSTALLATION AND USER GUIDE FOR BLACKBERRY

Data charges may apply. Check your wireless service plan.

DOWNLOAD:

1. Use one of these options to begin the download process:
 - Text MFM to 97328 from your mobile device. You will receive a text message with a link to wsecu.mobi.
 - Login to wsecu.mobi from a PC or mobile device, click on **Download Mobile Banking - MFM**.
 - Visit wsecu.org, select **Convenient Services** and then **Mobile Banking**. From here you can select **GET It NOW!** or link to the wsecu.mobi site.

Note: If you do not have access to online banking, contact the Call Center at 1.800.562.0999.

2. On your mobile device, click on the link in the text message to launch wsecu.mobi or hand type wsecu.mobi in your browser. Click on **Download Mobile Banking – MFM** and then **DOWNLOAD Mobile Finance Manager NOW**. Follow the steps to enter your account information and then mobile device information. You will receive a text message with a link so you can start the application at a later date or if you are currently activating on your mobile device, select **Download** and proceed.
3. The download site will guide you through loading the MFM application. Follow the instructions through the installation.




Important: The Activation ID will be used later in the setup process.
ID# _____.

INSTALLATION:

1. Step 1 - read and click **Next**.
Step 2 - read and click **Next**.
Step 3 - write down the Activation ID and click **Download**.
2. When asked if you would like to download a file to the device, select **Download**.
3. If prompted by your mobile device, set the Application Permissions.
4. The device may ask you to reboot to complete the installation. Click **Reboot**.
5. If you did not write down the Activation ID, check for a text message with the Activation ID.

SETUP ON MOBILE PHONE:

1. Click on the applications icon, then select the **MFM icon**  in the Blackberry main menu to launch the application.



2. Once MFM has been launched, you will be prompted to enter the **Activation ID** provided on the download page (see Step 3). Enter your code and click **Submit**.
3. If a successful connection is made, and the **Setup** screen appears, skip to **Step 4**. If an error message appears followed by an **APN Settings** screen, take the following steps.
 - Scroll to the **APN Settings** field, then press the **Alt** key (the lower left hand button).
 - Select the network provider being used by the device (if your provider is not listed, keep the setting as default).
 - Click **OK**.
4. When the **Setup** screen appears, all fields should be pre-populated but the **Password** field. Verify or enter the requested information on the **Setup** screen.
 - Verify the Activation code obtained in Step 5 matches the **Activation ID** on the screen.
 - Verify the User ID matches the Account Number that you normally use to login to the online banking site.
5. Enter the password you normally use to log in to your online banking site.

Note: Checking the **"Save Password"** box will store your password so you won't have to enter it every time you login. Be aware that if your device is lost or stolen, checking this option may compromise the security of your financial information. Password protecting your phone is recommended. Refer to your phone's instructions.
6. When the information on the **Setup** screen is complete and correct, click **Save**.
7. If you checked the **Save Password** box, you will be asked to verify that you would like MFM to store the password.
8. The **MFM Welcome** screen will appear once you have completed and saved the setup information.

Using Mobile Finance Manager:


Enabling the Wireless Connection

Before launching MFM, take the steps below to verify that the wireless radio is turned on to allow Internet access.

Look in the upper right hand corner of your **Home** screen, just above the battery icon.

- If there are 1-5 blue bars next to the **Antenna** icon, your wireless radio is activated; proceed to **Access the MFM Application**.
- If the word **"OFF"** appears, follow the steps below:
 - a. On the **Home** screen, use the trackwheel button on the right side of the device to scroll over to the 'Radio tower' icon so that an orange bracket appears over the icon. The message **"Turn Wireless On"** will appear in the status bar at the bottom of the screen.
 - b. Click on the icon to turn wireless on.

Access MFM application:

1. On the **Home** screen, scroll over the icon that resembles a set of folders. The message in the status bar below will say **Applications**. Press the track wheel button.
2. Scroll over the green MFM application icon.  Press the track wheel button.
3. The **MFM Welcome** screen will appear.



Welcome Screen:

The Welcome screen allows you to navigate to the following areas of the application:

- **Messages:** Send and retrieve messages to/from WSECU.
- **Banking:** View balances and transactions; transfer funds between accounts.
- **Setup:** Select financial institution and manage settings for viewing Balances, Messages and Payments.
- **About:** Version information about the Mobile Finance Manager (MFM) along with contact and support information.
- **Exit:** Close the application.



Messages:

To retrieve and review messages from WSECU, from the **Welcome** screen, select **Messages** and then **Refresh**.

The following options are available from the **Messages** menu:

- **View:** Read the selected message.
- **New:** Create a new message.
- **Reply:** Reply to a message from WSECU.
- **Delete:** Remove a message from your message list.
- **Lock/Unlock:** Locking a message will prevent a message from being read or deleted. If a message is locked, a yellow envelope icon with a red dot will appear next to the message. Unlocking a message will remove the lock on the message.
- **Refresh:** Check for new messages.
- **Clean Old:** Remove all emails received prior to a date you specify in the **Setup** section. This is useful if you find that you have too many messages and want to remove several without having to delete each one.
- **Reload All:** Reload all active messages at WSECU. This option will also reload any messages you have deleted via the Delete or Clean Old option.

The messages screen will display the time messages were last updated. To update messages, select **refresh** from the messages menu.



Banking

On the **Welcome** screen, select **Banking**. The **Bank Account** list screen will display information about your accounts in the following order:

- Account Type (Checking = CHKG, Savings=SAVG, etc.) and suffix

- Available Cash Balance for each account
- Account Description

You can choose from the following options on the **Bank Account** list menu:

- **Transfer Money:** Transfer funds between accounts.
- **View Transactions:** View the transactions for the highlighted account. You can also view the transactions by pressing the action button on the device.
- **Refresh:** Updates transactions or balances posted since the page was opened.
- **Back:** Exit the current window and return to the previous window.

To view a list of transactions for a specific account:

- Highlight the account you wish to view
- Select **Menu > View Transactions**
- The **Most Recent Transactions** screen will appear

Setup

From the **Welcome** screen, select **Setup** to view or change your current application settings. The following options are available from the **Setup** menu:

- **Account:** This area allows you to enter the User ID and password for the account that MFM is currently set up to access. When you select this option, the current configuration is displayed.
 - At the **Financial Institution** field, confirm that the abbreviated name for WSECU appears. If it doesn't, drop down the menu and select WSECU.
 - To add or change the **User ID (account number)**, select **Add UserID** from the menu.
 - To change the **Password** for the User ID (**account number**), click and edit the text in the **Password** field. To save the password, select **Save** from the menu.
- **Note: A warning message will appear about saving your password.**
- At the **Activation ID** field, enter the activation id presented during the download process.

About

From the **Welcome** screen, choose **About**. This area displays the information about the MFM version and the selected financial institution.

The following options are available from the **About** screen menu:

- **Info:** Display contact information about WSECU.
- **WWW:** Launch the Internet browser and connect to WSECU's URL displayed on the **Info** dialog.
- **Call:** Dial WSECU's phone number displayed on the **Info** dialog.
- **Back:** Exit the current window and returns to the previous window.

Help

Learn more about MFM features from the online help manual. This manual provides you the details and options for using and configuring Mobile Finance Manager.



Miscellaneous Operations & Information:

Updating Mobile Finance Manager

Use the following steps to upgrade MFM:

1. MFM will automatically check for a new version every month. To check for updates manually, select **Check for updates** from the menu on the **Setup** screen. This will automatically connect to the internet and check for a new version.
2. If an upgrade is ready, you will see the message, "MFM version X.x is available for download. Would you like to upgrade now?" Click **Yes**. The browser will open the installation screen and provide you with the steps to follow.

Uninstalling Mobile Finance Manager

To uninstall MFM from your BlackBerry:

1. From the **Main Menu**, select **Settings > Options**.
2. Click **Advanced Options > Applications**.
3. Scroll down and select **MFM** from the list of available applications. Click **Delete**.
4. You will be asked whether you're sure you want to delete MFM. Click **Yes**.
5. The following message will appear: "Deletion will occur when handheld is restarted. Restart Now?" Click **Yes** to make your BlackBerry restart automatically.

Having Trouble?

Browse help in Mobile Finance Manager or visit wsecu.org and type MFM in the search field.